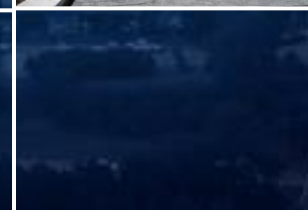


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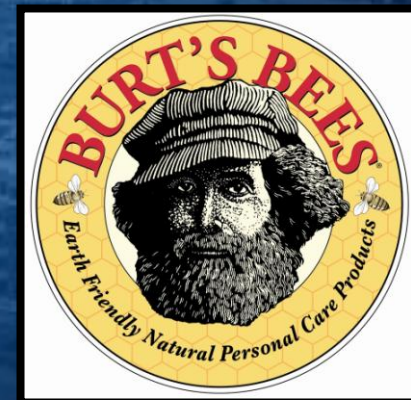


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THANKS TO OUR VENDORS!

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- **Anesnah Design and Marketing**
- **Durham Catering Company**
- **Centerplate**
- **Fedex/Kinko's**
- **SpeedDeeQue**

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PART I: FROM TRIALS TO TRIUMPHS

FROM TRIALS TO TRIUMPHS...

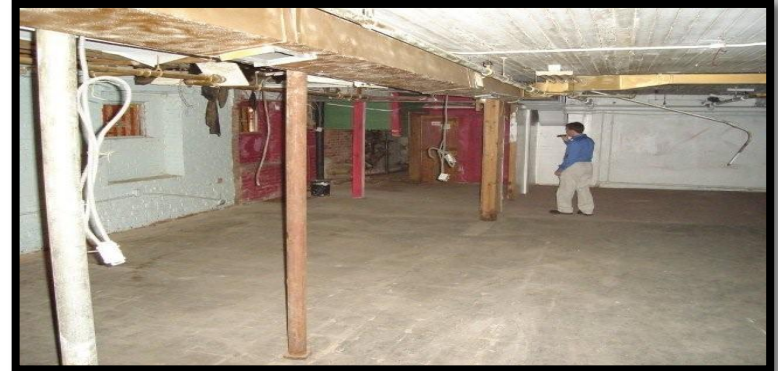


Coach John B. McLendon Jr.



Coach Michael W. Krzyzewski

TRIALS...



John O'Daniel Business Center, Pre-Renovation

TO TRIUMPHS



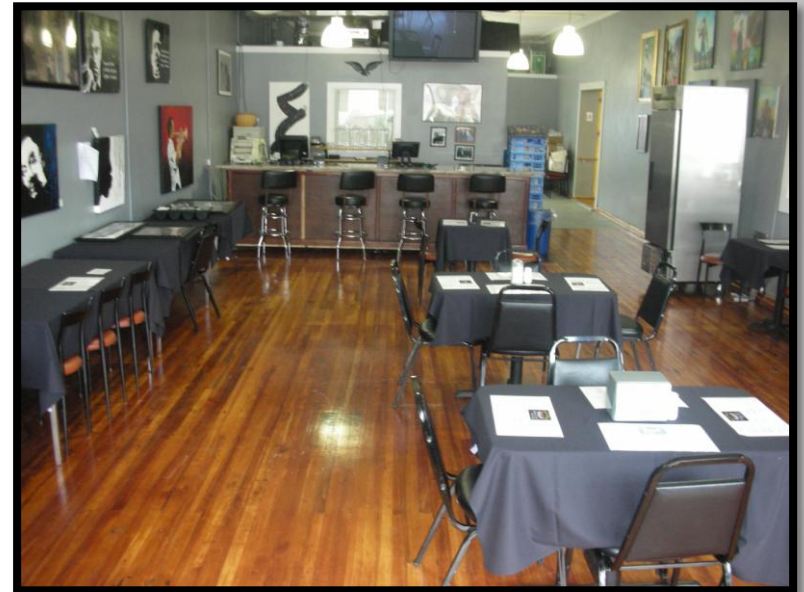
John O'Daniel Business Center, Post-Renovation

TRIALS...



Joe's Diner, Pre-Renovation

TO TRIUMPHS



Joe's Diner, Post-Renovation

TRIALS...



American Tobacco Campus, Pre-Renovation

TO TRIUMPHS



American Tobacco Campus, Post-Renovation

MORE TRIUMPHS FOR DURHAM: DOWNTOWN

- Durham Performing Arts Center - “The DPAC”
- Durham Athletic Park – “The DAP”
- Mangum 506
- James Scott Farrin & Burt’s Bees relocate to Downtown Durham

MORE TRIUMPHS FOR DURHAM: NEIGHBORHOODS

- Holton Career & Resource Center
- Expansions of North Carolina Central University
- Brownfields Programs
- Union Independent School
- Durham Rescue Mission

MORE TRIUMPHS FOR DURHAM

- Expansions of Duke University Hospital & Medical Center
- ACW Technology
- IEM
- EMC Corporation
- \$1M in federal stimulus funds put 300 people to work
- Durham Tech began the JobsNow Program

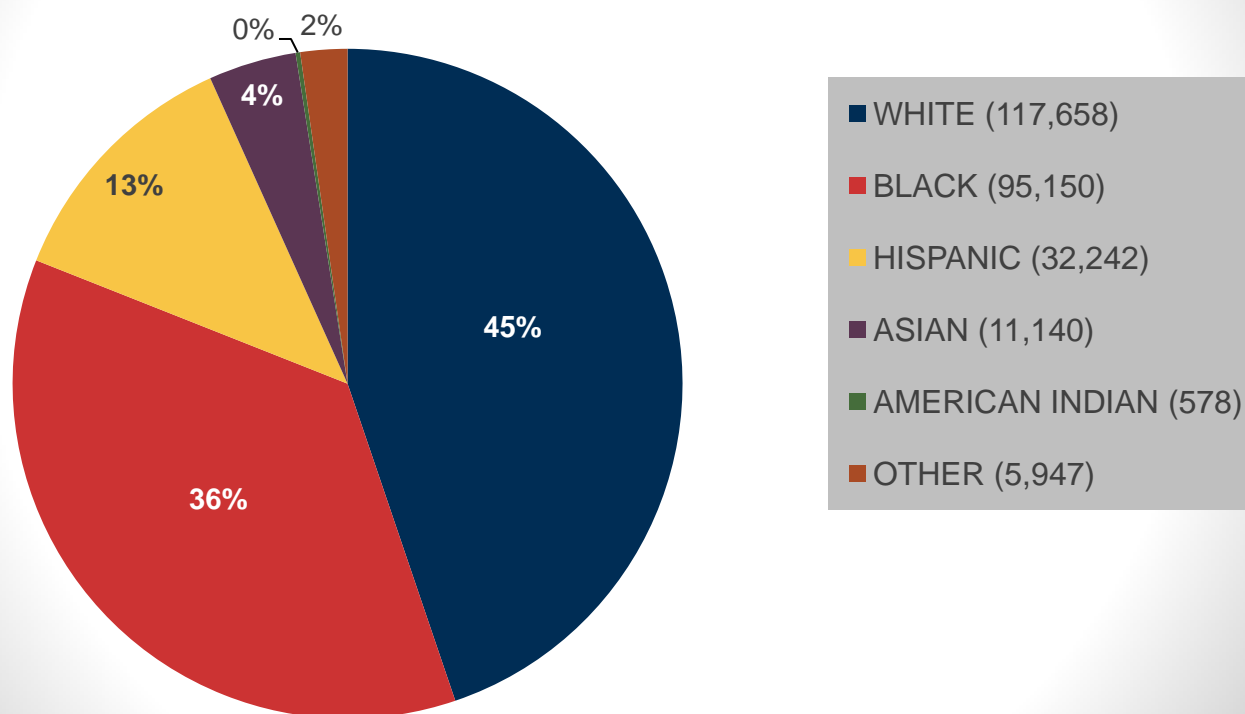
the STATE of **DURHAM'S** **ECONOMY** 2010

PART II: **WHERE WE ARE NOW AND WHERE WE CAN GO**

DURHAM POPULATION & DEMOGRAPHICS

DURHAM COUNTY'S DIVERSITY BASED ON 2008 SURVEY

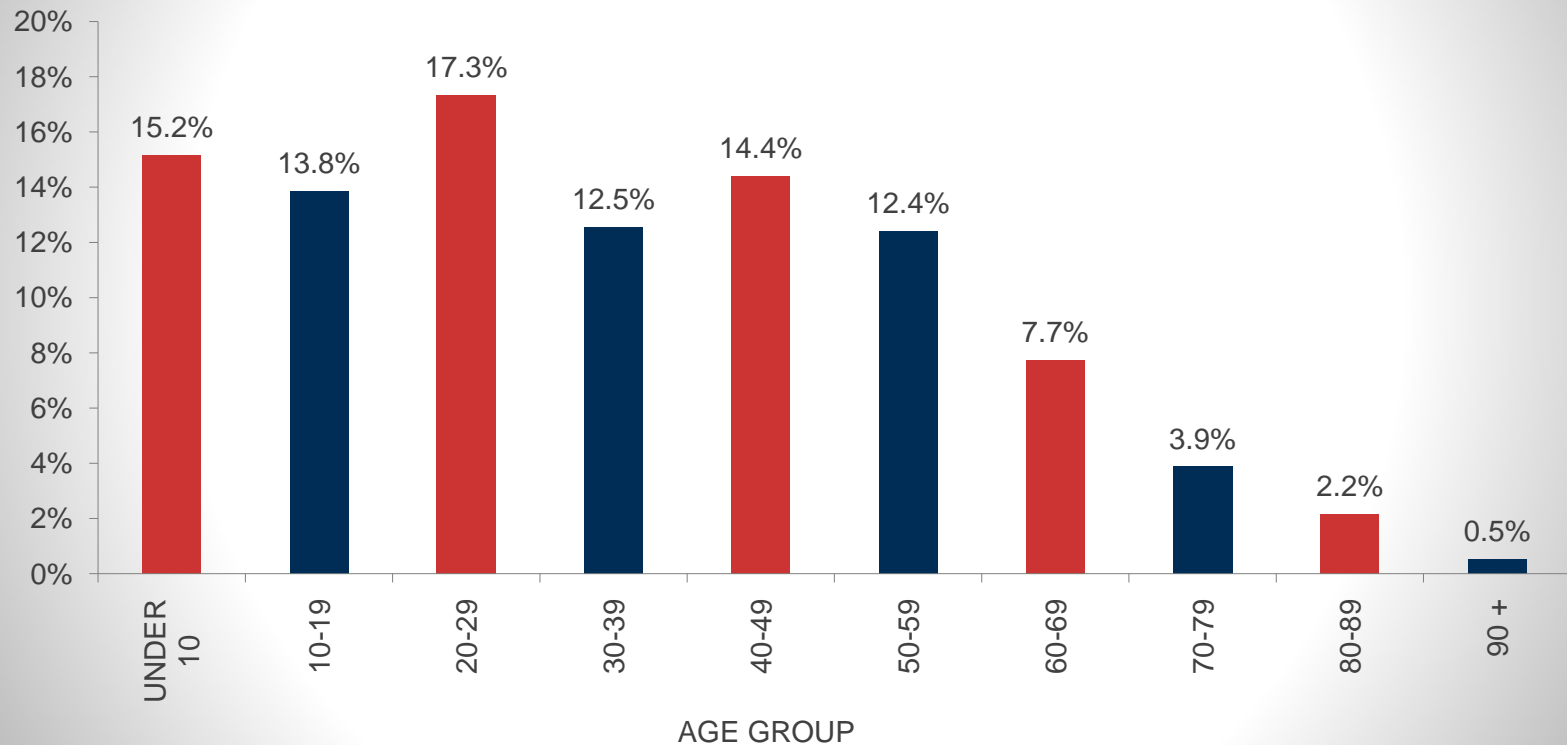
SOURCE: U.S. CENSUS BUREAU/AMERICAN COMMUNITY SURVEY/OEWD



DURHAM POPULATION & DEMOGRAPHICS

DURHAM COUNTY POPULATION BY AGE, BASED ON JULY 2009 ESTIMATE

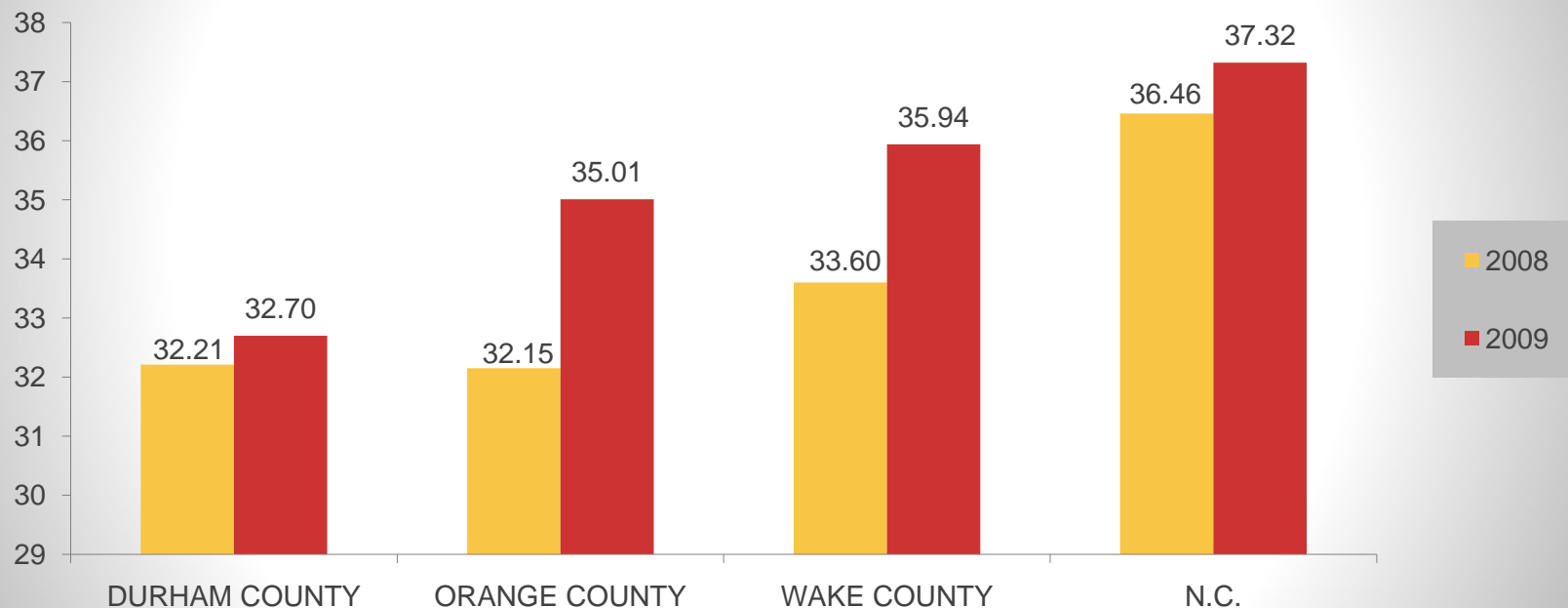
SOURCE: NC STATE DATA CENTER/OEWD



DURHAM POPULATION & DEMOGRAPHICS

CHANGE IN MEDIAN AGE (2008-2009)

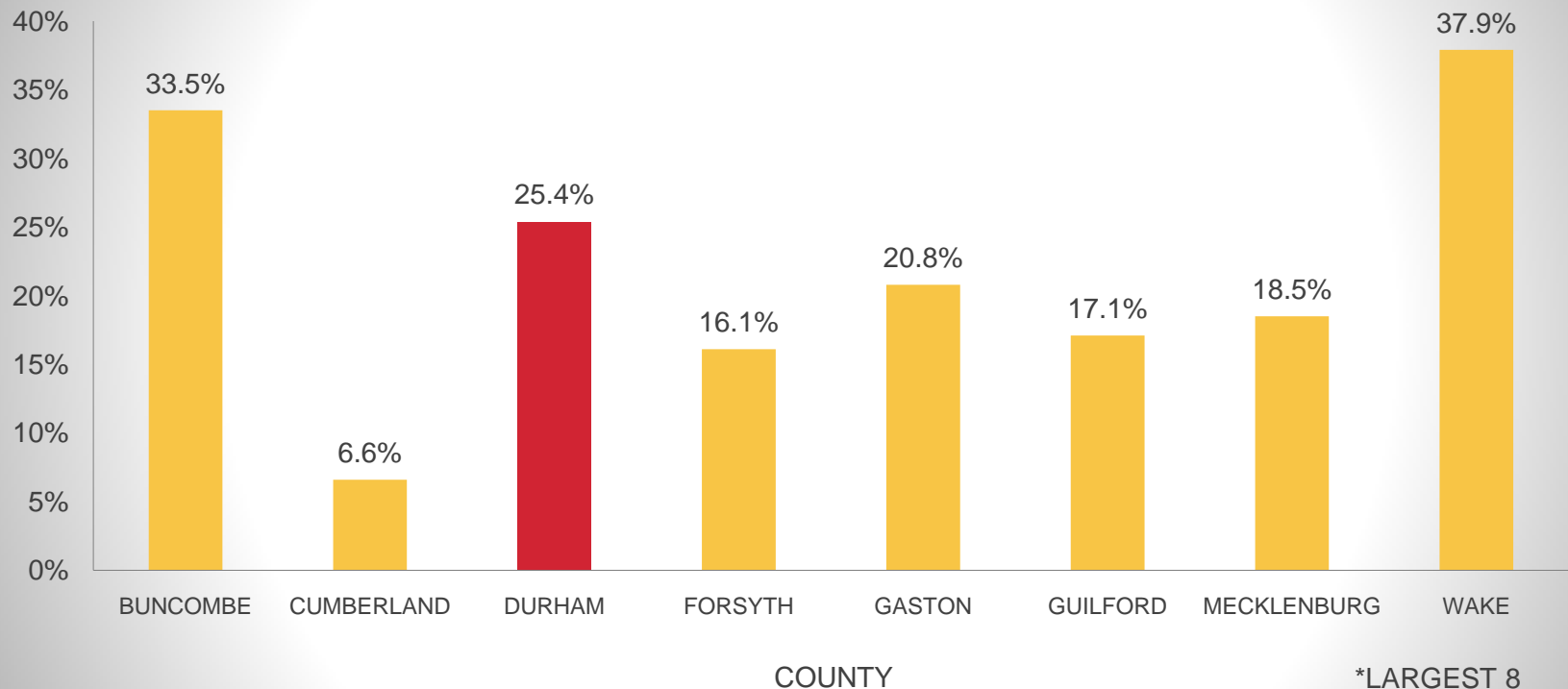
SOURCE: NC STATE DATA CENTER/OEWD



DURHAM POPULATION & DEMOGRAPHICS

COUNTY POPULATION PROJECTIONS BY PERCENT CHANGE FROM 2010-2020*

SOURCE: NC STATE DATA CENTER/OEWD

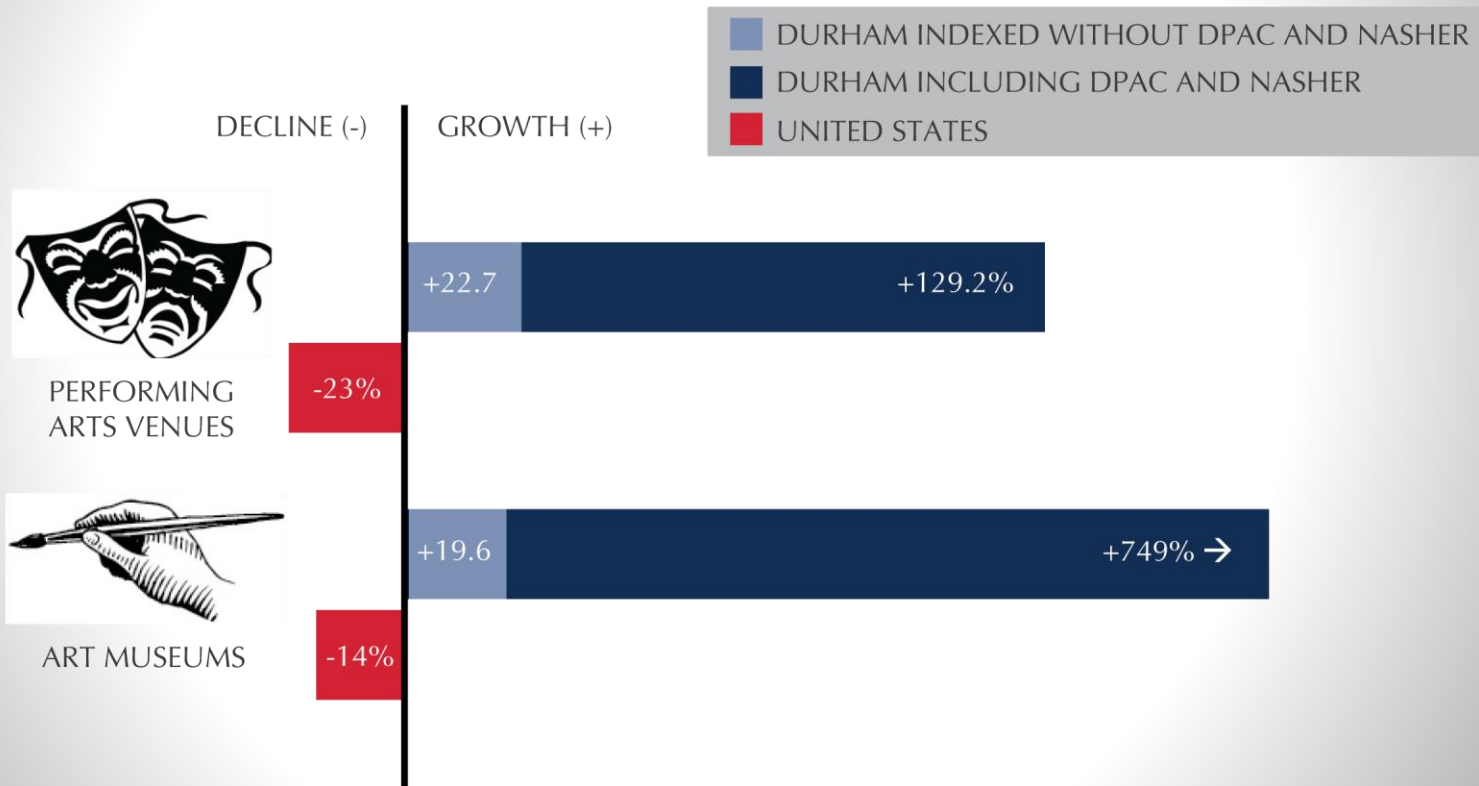


*LARGEST 8
COUNTIES AS OF
2009

DURHAM VISITOR IMPACT

INCREASE/DECREASE IN ARTS PARTICIPATION: 2002 TO 2008

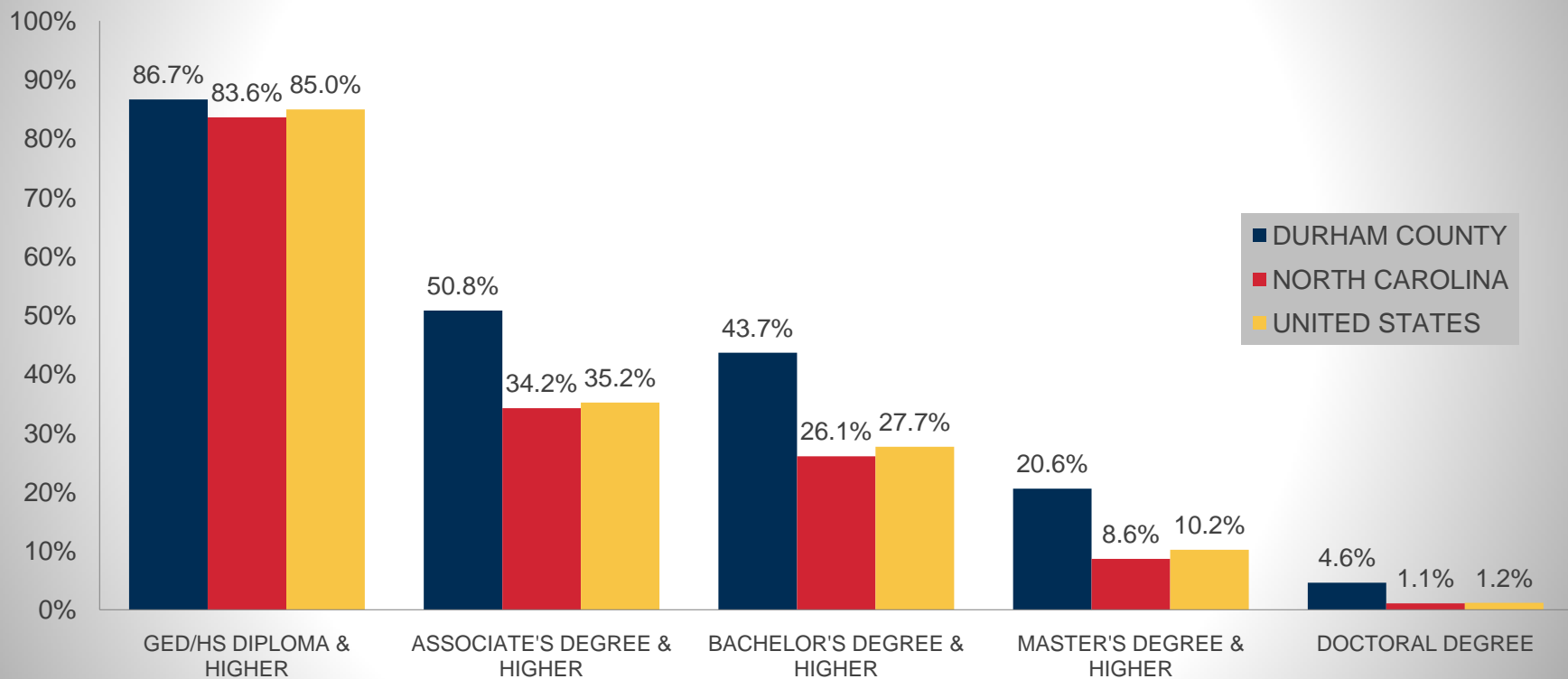
SOURCE: NATIONAL ENDOWMENT FOR THE ARTS; U.S. CENSUS BUREAU, D.K. SHIFFLET AND ASSOCIATES, DCVB



DURHAM EDUCATION

2008 EDUCATIONAL ATTAINMENT FOR POPULATION 25 YEARS AND OVER

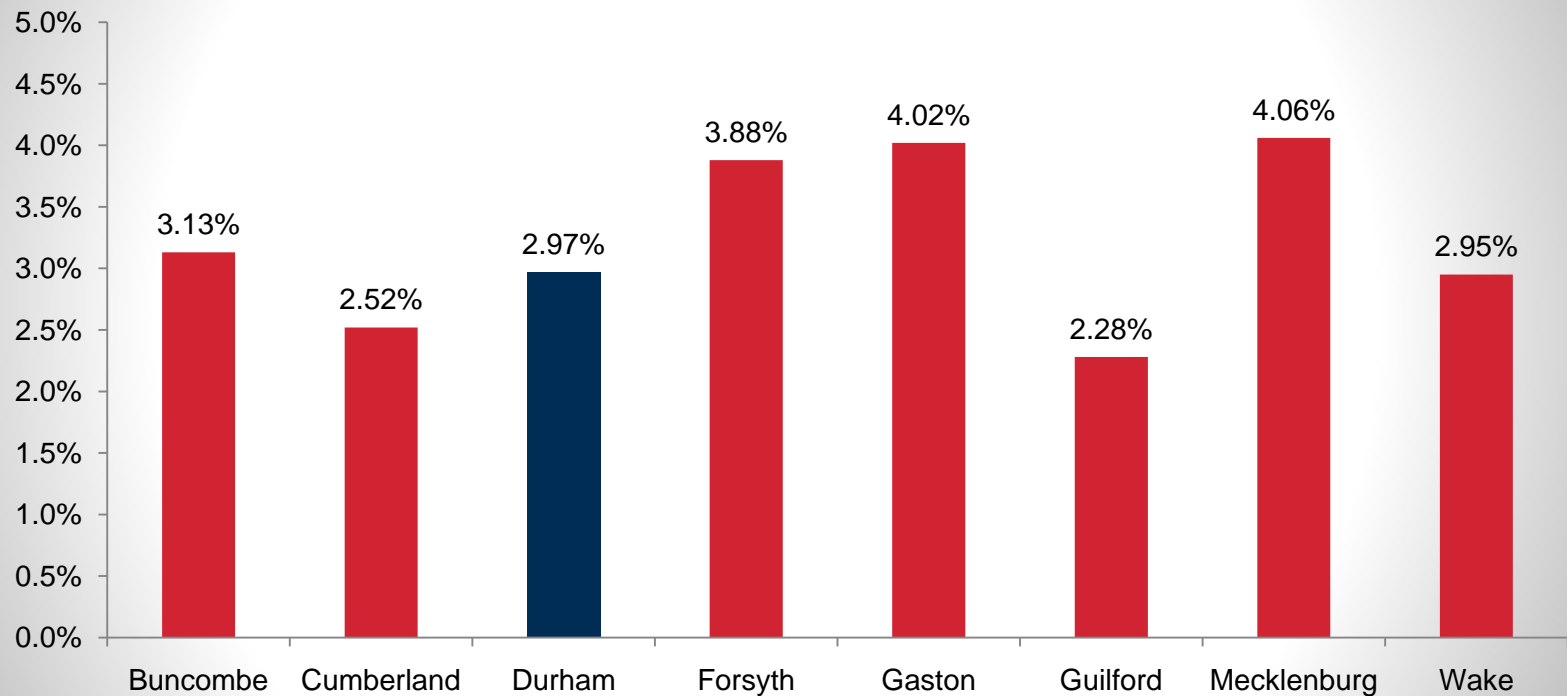
SOURCE: U.S. CENSUS BUREAU, 2008 AMERICAN COMMUNITY SURVEY/OEWD



DURHAM EDUCATION

DROPOUT RATES IN NC COUNTY SCHOOL DISTRICTS, 2007-2008

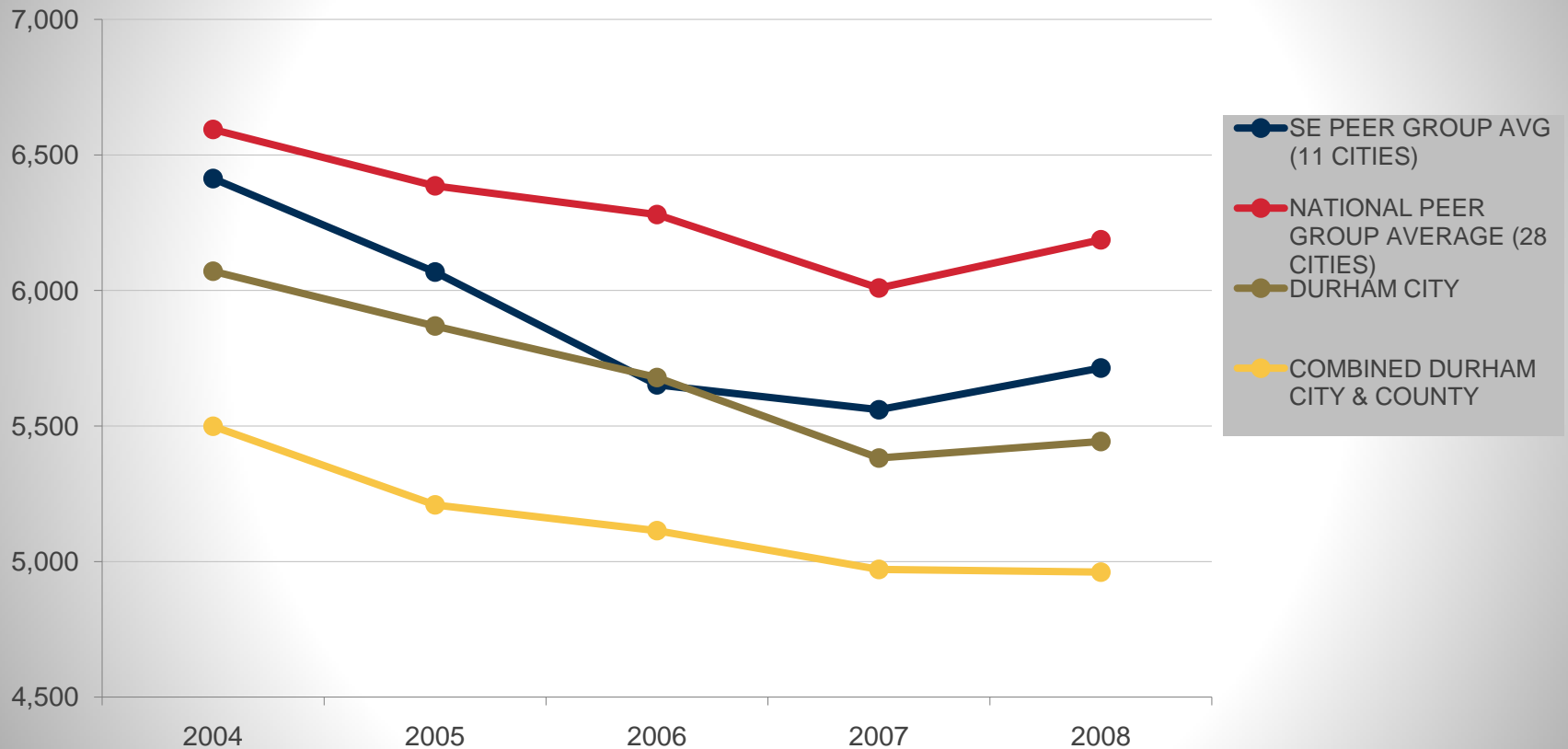
SOURCE: DEPARTMENT OF PUBLIC INSTRUCTION/OEWD



DURHAM PUBLIC SAFETY

PROPERTY CRIME TRENDS (CRIMES PER 100,000): 2004-2008

SOURCE: DURHAM CONVENTION & VISITORS BUREAU/OEWD



Durham benchmarks itself against other cities to compare information. City staff has reviewed demographic data on southeastern & national cities that are most comparable to Durham. These peer groups have been approved for use when benchmarking performance and comparative data by the City Manager and City Council.

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DURHAM PUBLIC SAFETY

VIOLENT CRIMES

HIGHEST CRIME RATE	Flint, MI Stockton, CA Birmingham, AL Little Rock, AR Bridgeport, CT Baton Rouge, LA Tallahassee, FL Rochester, NY	4 TH QUARTILE
	Chattanooga, TN Dayton, OH Grand Rapids, MI Tacoma, WA Shreveport, LA Jackson, MS Beaumont, TX	3 RD QUARTILE
AVERAGE CRIME RATE	Winston-Salem, NC Greensboro, NC Durham (City Only) Norfolk, VA St. Paul, IN Richmond, VA South Bend, IN	2 ND QUARTILE
	Salt Lake City, UT Durham (City & County) Springfield, MO Raleigh, NC Mobile, AL Augusta, Ga Montgomery, AL	1 ST QUARTILE
LOWEST CRIME RATE		

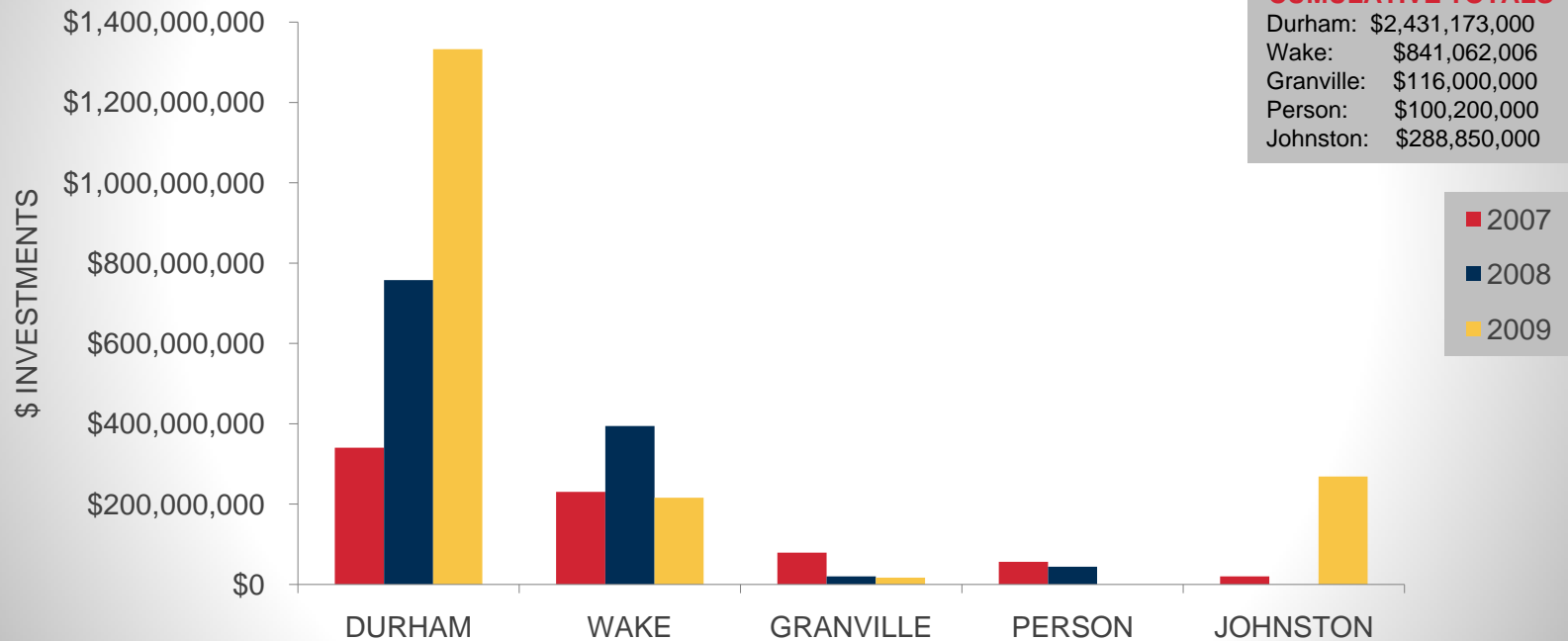
PROPERTY CRIMES

HIGHEST CRIME RATE	Springfield, MO Salt Lake City, UT Birmingham, AL Little Rock, AR Tacoma, WA Augusta, GA Chattanooga, TN Jackson, MS	4 TH QUARTILE
	Montgomery, AL South Bend, IN Winston-Salem, NC Greensboro, NC Dayton, OH Stockton, CA Flint, MI	3 RD QUARTILE
AVERAGE CRIME RATE	Beaumont, TX Mobile, AL Baton Rouge, LA Durham (City Only) Rochester, NY Tallahassee, FL Shreveport, LA	2 ND QUARTILE
	Norfolk, VA Durham (City & County) Grand Rapids, MI Bridgeport, CT St. Paul, IN Raleigh, NC Richmond, VA	1 ST QUARTILE
LOWEST CRIME RATE		

DURHAM BUSINESS DEVELOPMENT

TOP FIVE RESEARCH TRIANGLE COUNTIES FOR ANNOUNCED INVESTMENTS, 2007-2009 (CUMULATIVE)

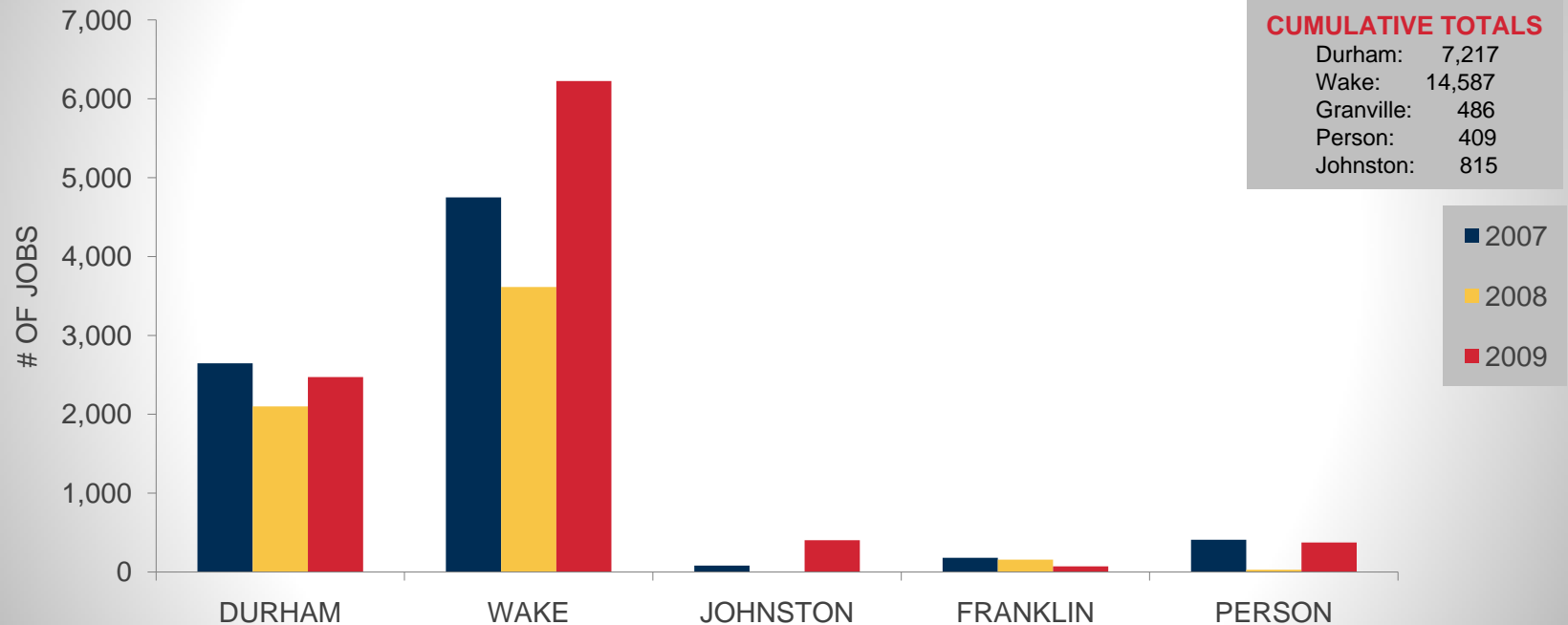
SOURCE: RESEARCH TRIANGLE REGIONAL PARTNERSHIP/ GREATER DURHAM CHAMBER OF COMMERCE



DURHAM BUSINESS DEVELOPMENT

TOP FIVE RESEARCH TRIANGLE COUNTIES FOR ANNOUNCED JOBS, 2007-2009 (CUMULATIVE)

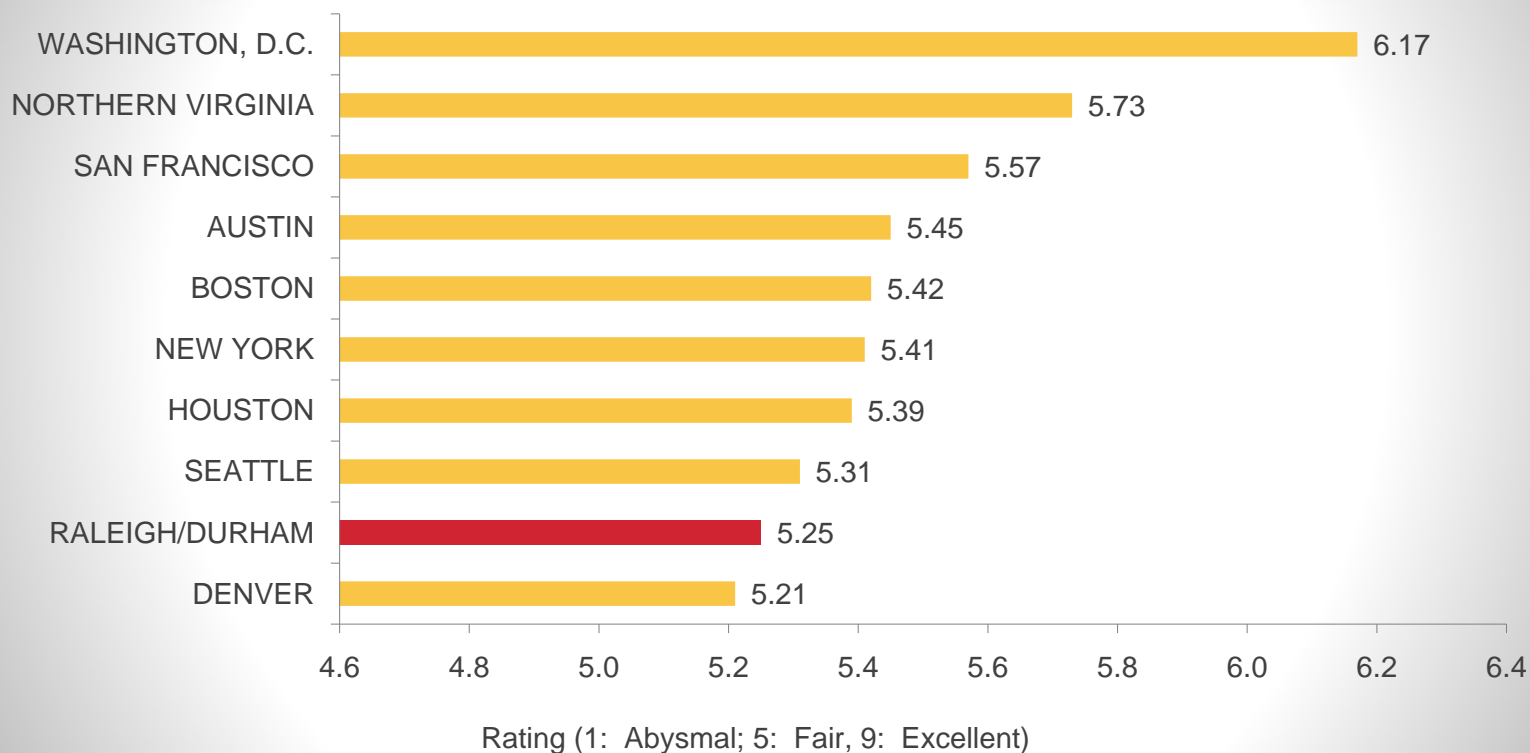
SOURCE: RESEARCH TRIANGLE REGIONAL PARTNERSHIP/ GREATER DURHAM CHAMBER OF COMMERCE



DURHAM BUSINESS DEVELOPMENT

TOP 10 REGIONS FOR COMMERCIAL/MULTIFAMILY INVESTMENT

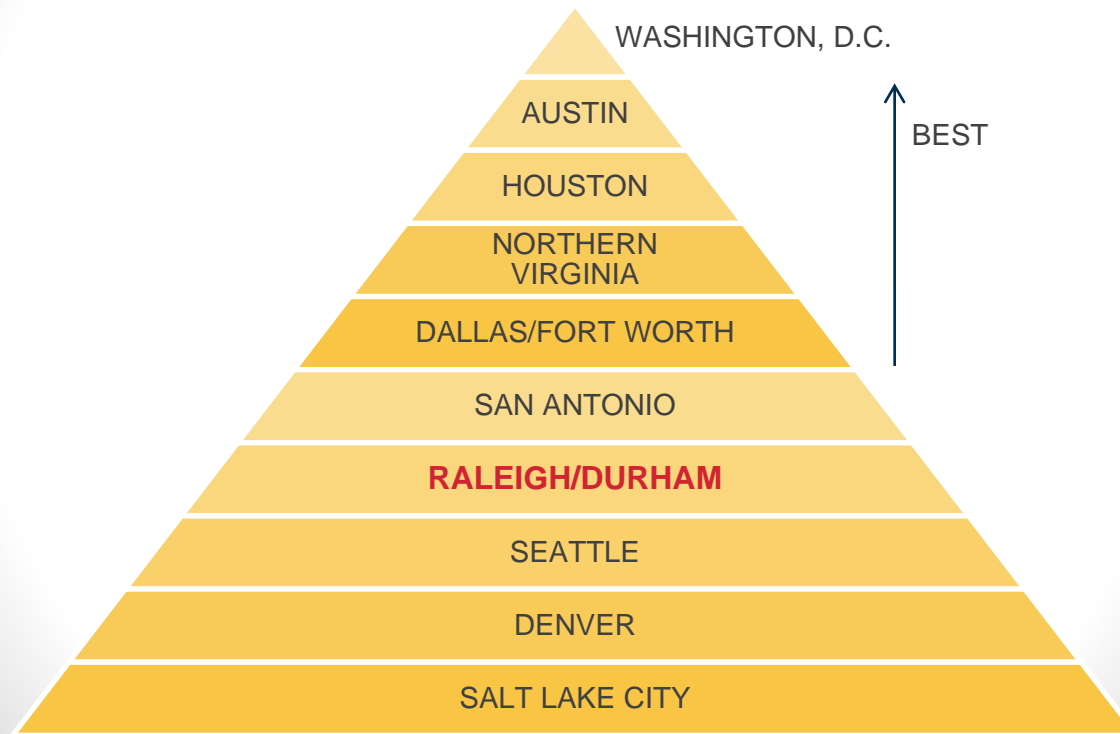
SOURCE: EMERGING TRENDS IN REAL ESTATE 2010 (URBAN LAND INSTITUTE/OEWD)



DURHAM REAL ESTATE

TOP 10 REGIONS FOR NEW HOME-BUILDING

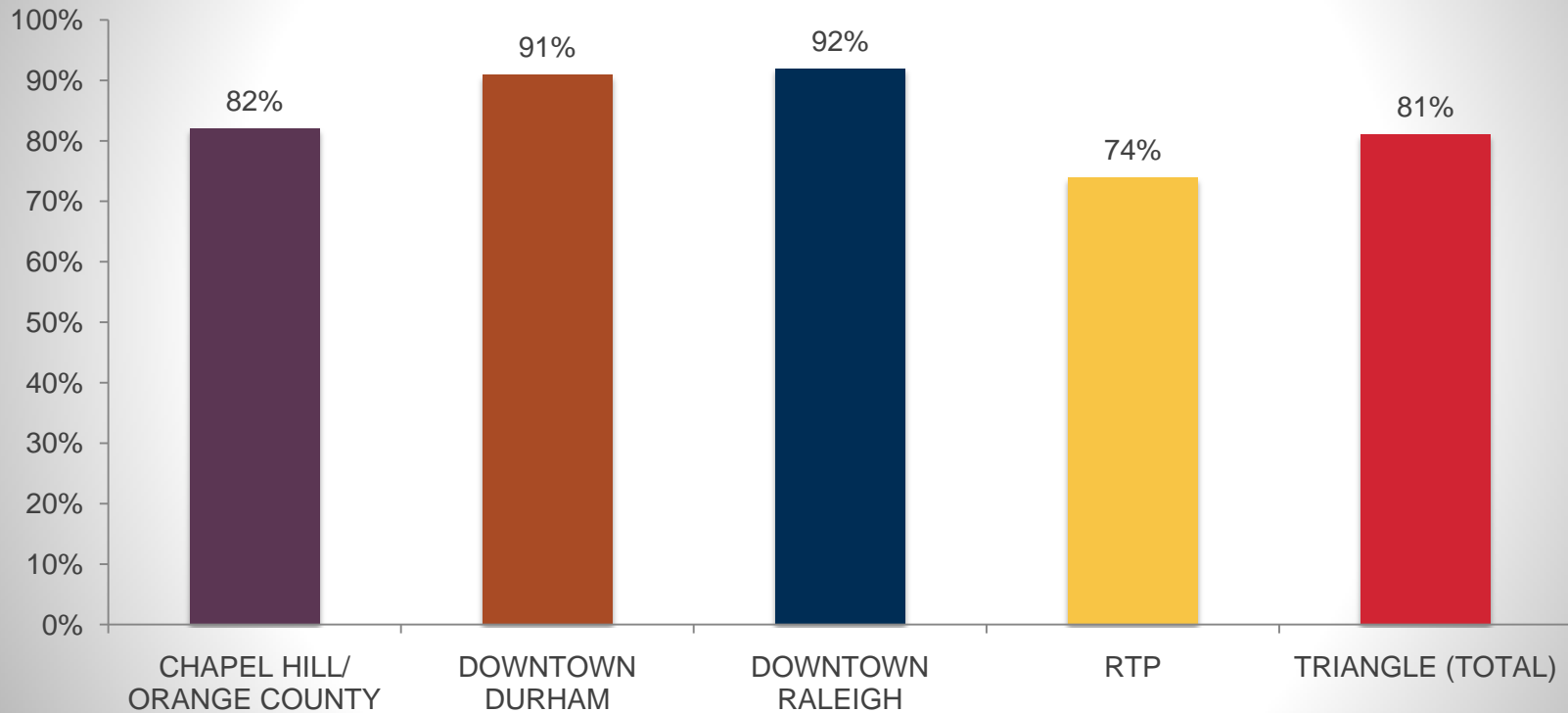
SOURCE: EMERGING TRENDS IN REAL ESTATE 2010 (URBAN LAND INSTITUTE)/OEWD



DOWNTOWN DURHAM

OFFICE OCCUPANCY IN THE TRIANGLE & SUBMARKETS (DEC. 2009)

SOURCE: DDI



DURHAM EMPLOYMENT AND WAGES

12 LARGEST DURHAM COUNTY EMPLOYERS (3rd QTR 2009)

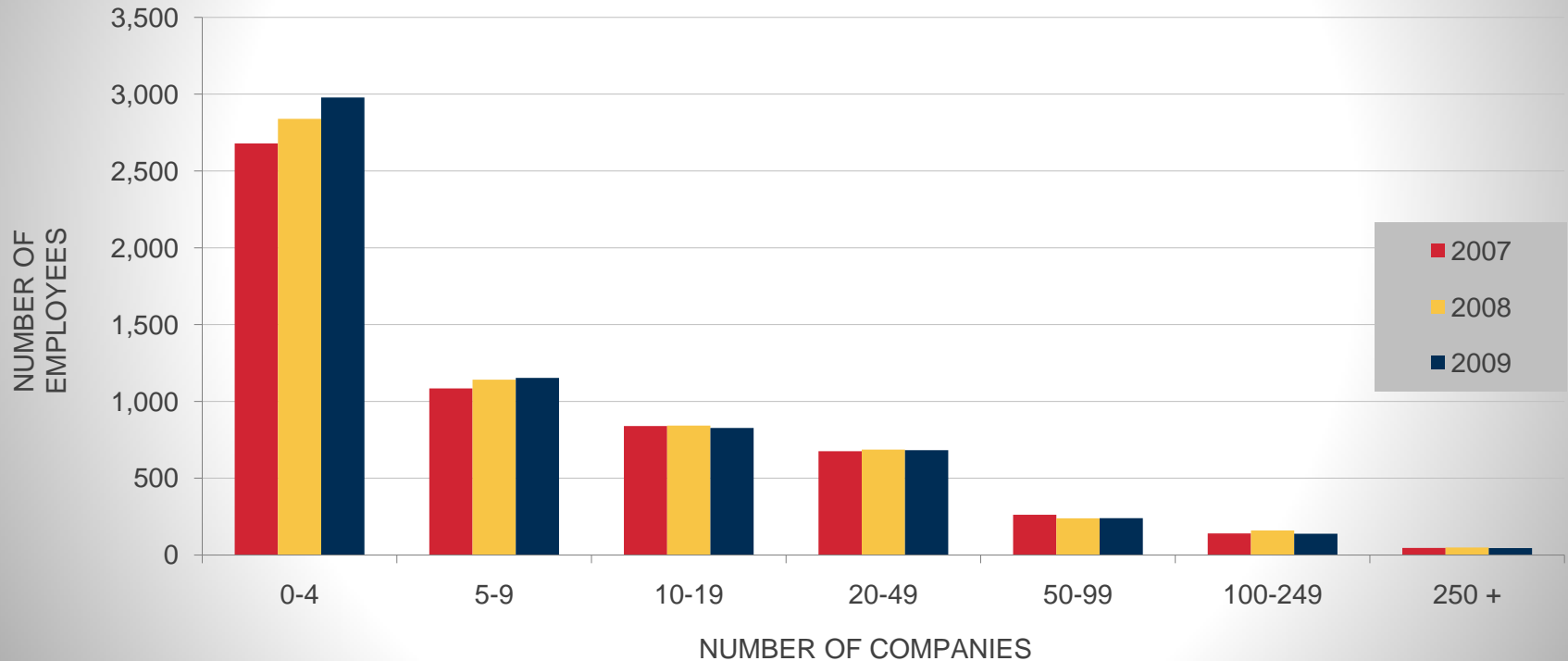
SOURCE: NC EMPLOYMENT SECURITY COMMISSION/OEWD

COMPANY NAME	INDUSTRY
Duke University	Education & Health Services
International Business Machines	Manufacturing
Durham Public Schools	Education & Health Services
Glaxosmithkline	Education & Health Services
Blue Cross & Blue Shield of NC Inc.	Financial Activities
City of Durham	Public Administration
Va Medical Center	Education & Health Services
Research Triangle Institute	Professional & Business
Duke University Health Systems Inc.	Education & Health Services
Durham County	Public Administration
Fidelity Employer Services LLC	Professional & Business
Nortel Networks, Inc.	Manufacturing

DURHAM EMPLOYMENT AND WAGES

NUMBER OF COMPANIES BY EMPLOYMENT SIZE - DURHAM COUNTY 2ND QUARTER, 2007-2009

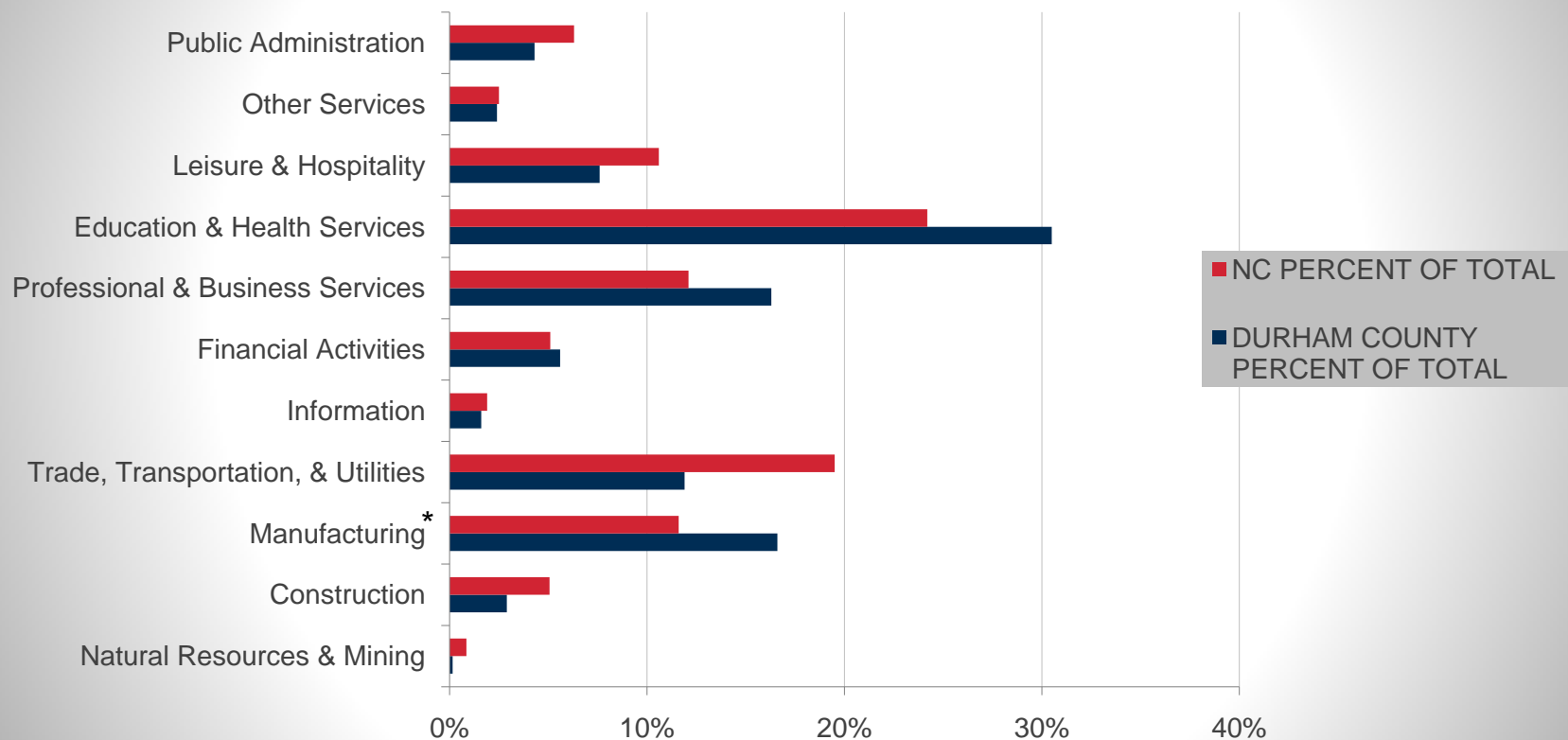
SOURCE: NC EMPLOYMENT SECURITY COMMISSION



DURHAM EMPLOYMENT AND WAGES

SELECTED INDUSTRIES - PERCENT OF TOTAL EMPLOYMENT, DURHAM COUNTY VS NC, 2009 (Q2)

SOURCE: NC EMPLOYMENT SECURITY COMMISSION/OEWD

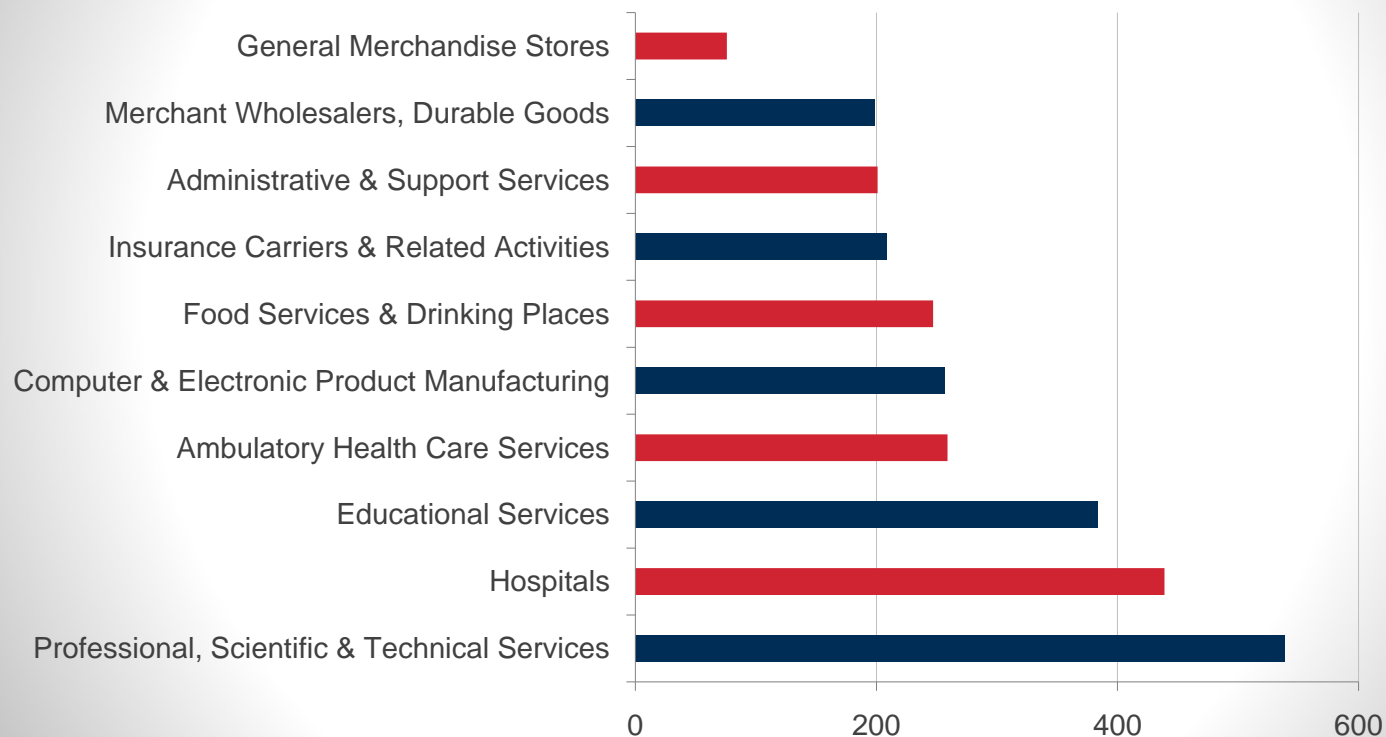


* Includes Biomanufacturing

DURHAM EMPLOYMENT AND WAGES

ANNUAL LONG-TERM OCCUPATIONAL PROJECTIONS FOR SELECTED INDUSTRIES WITH GROWING EMPLOYMENT: DURHAM COUNTY, 2006-2016

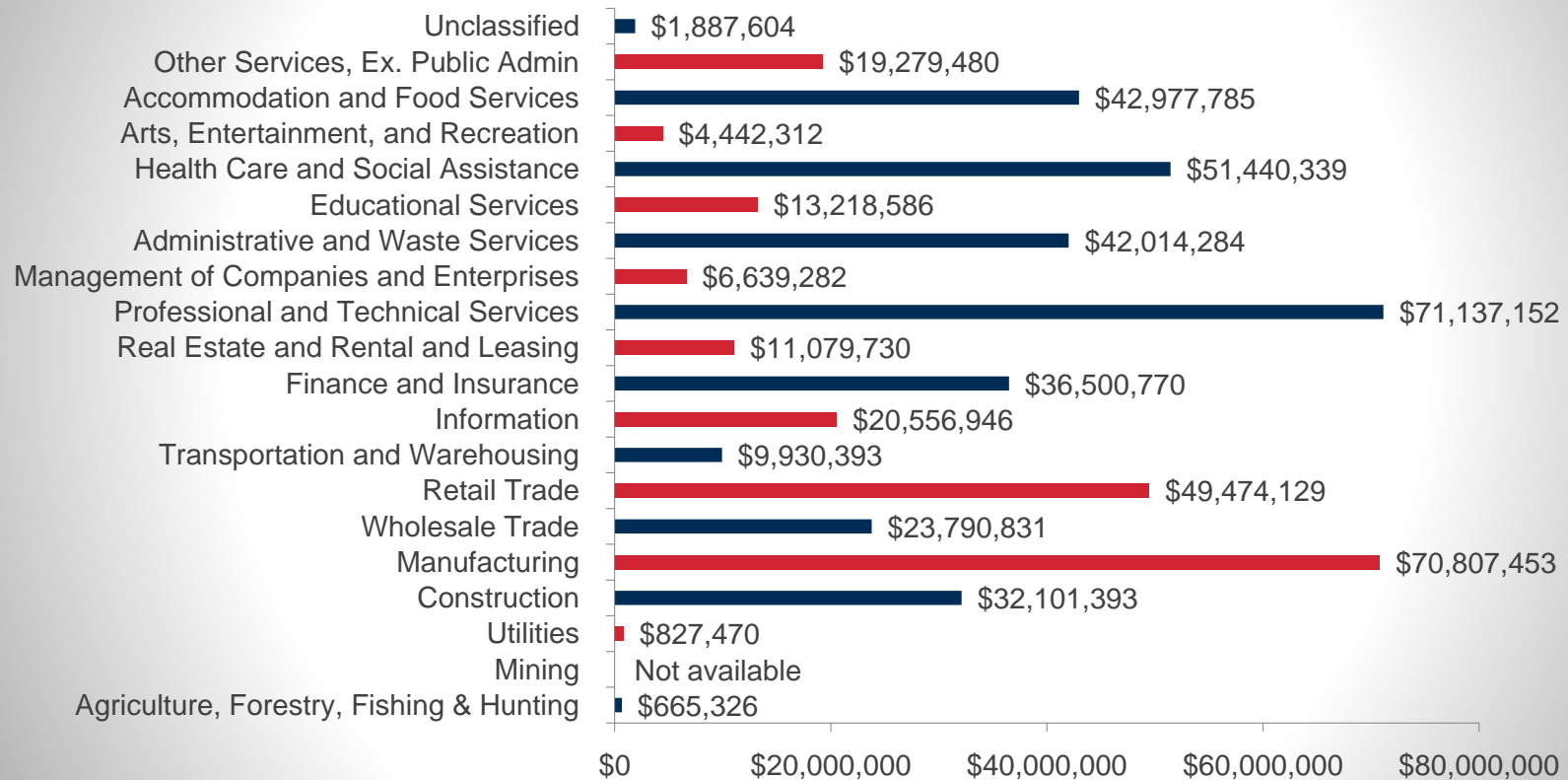
SOURCE: NC EMPLOYMENT SECURITY COMMISSION/OEWD



DURHAM EMPLOYMENT AND WAGES

TOTAL WAGES OF DURHAM COUNTY INDUSTRIES: 2009 (Q2)

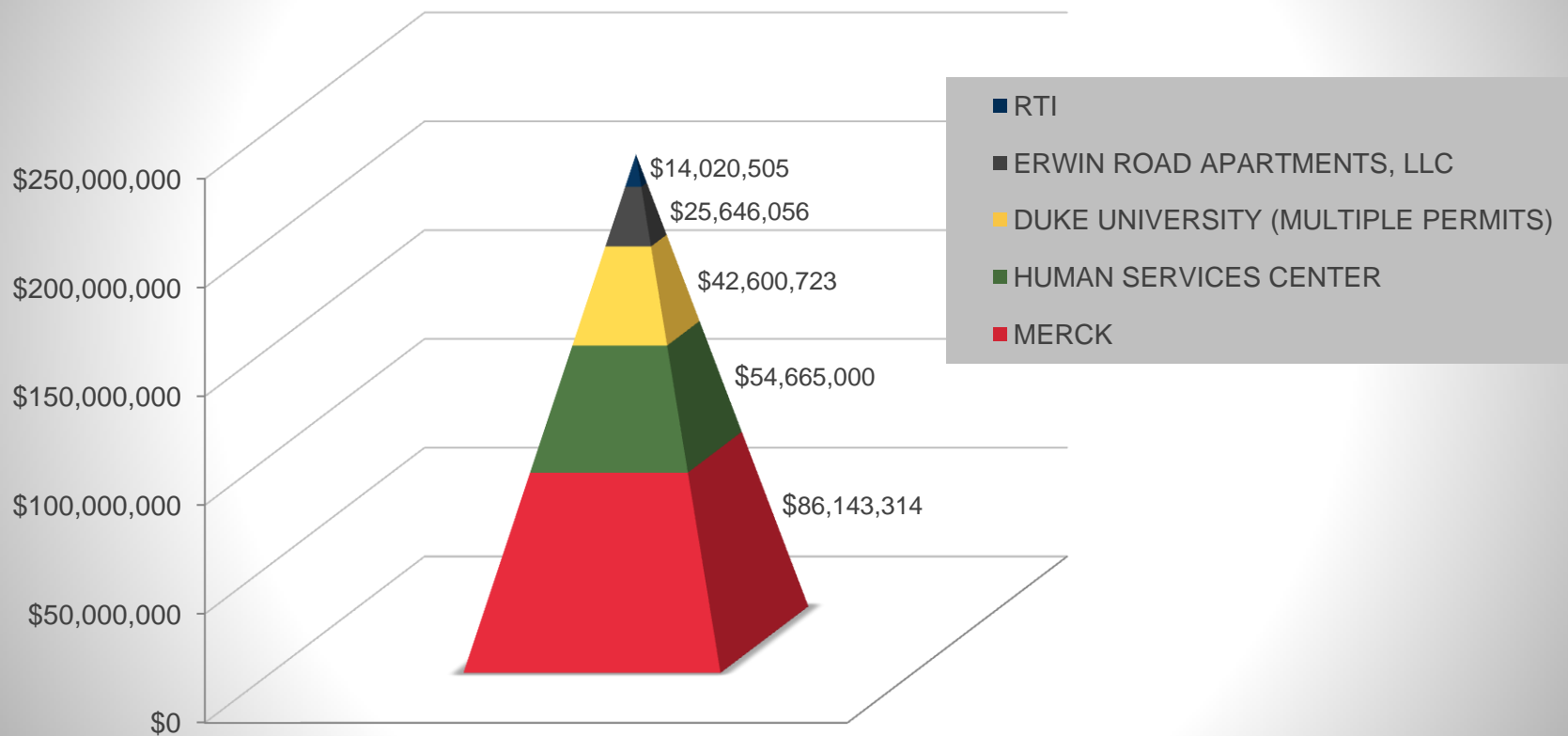
SOURCE: NC EMPLOYMENT SECURITY COMMISSION/OEWD



DURHAM CONSTRUCTION ACTIVITY

TOP 5 PERMIT VALUES IN 2009-DURHAM COUNTY

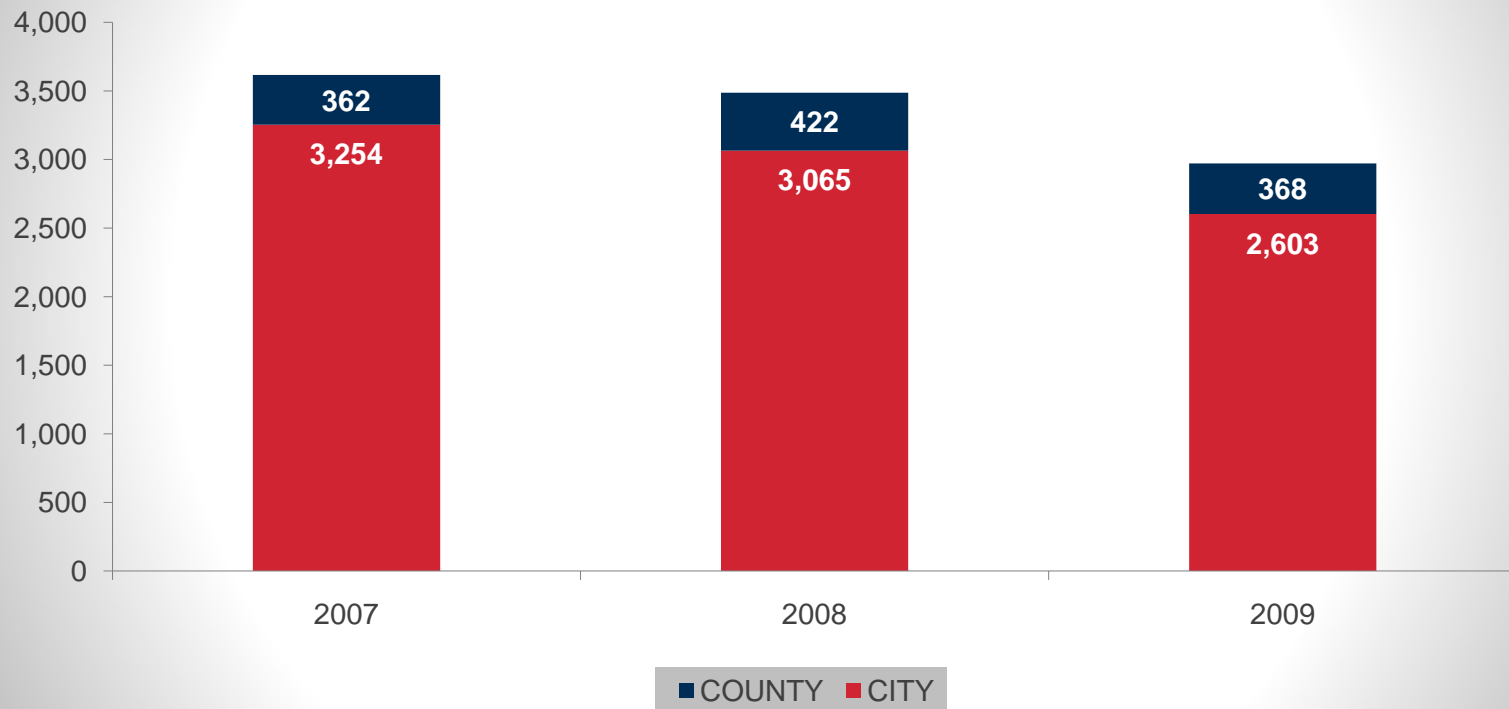
SOURCE: DURHAM CITY-COUNTY INSPECTIONS DEPT., DURHAM COUNTY



DURHAM CONSTRUCTION ACTIVITY

TOTAL NUMBER OF PERMITS - DURHAM CITY & COUNTY

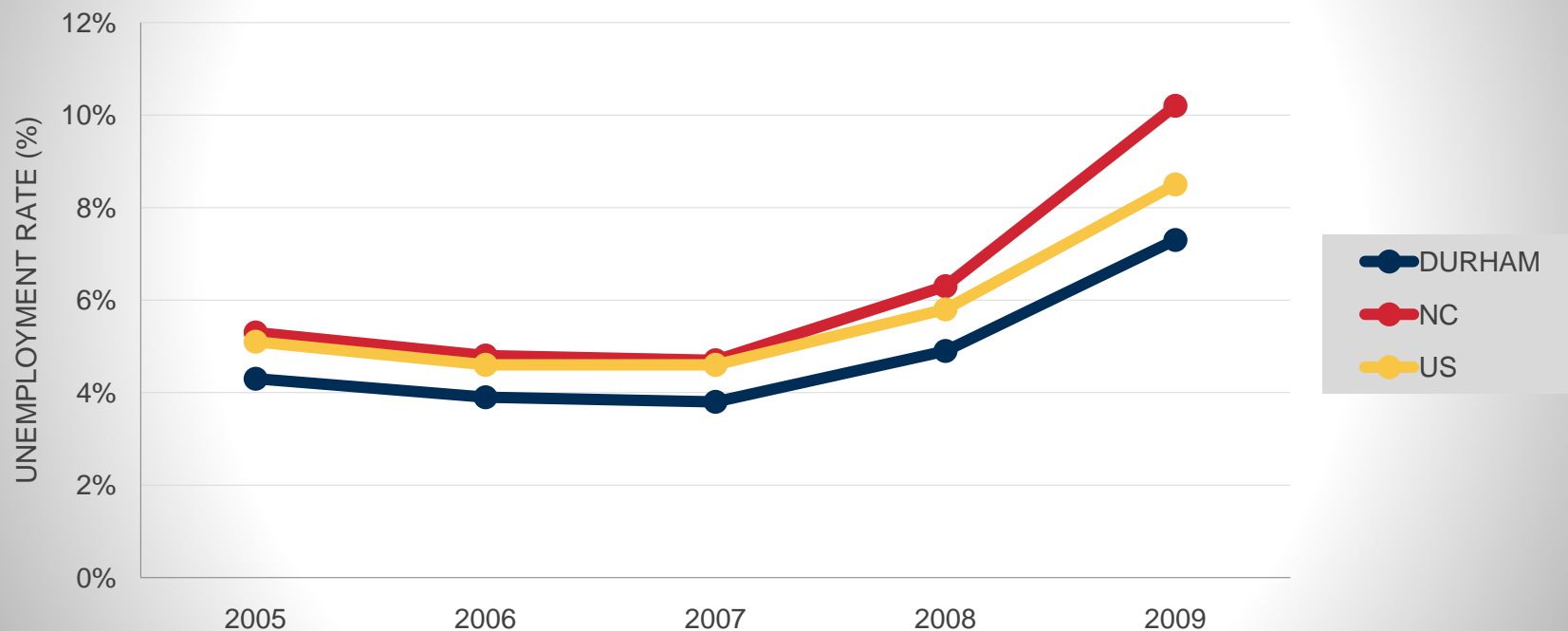
SOURCE: DURHAM CITY-COUNTY INSPECTIONS DEPT., DURHAM COUNTY



DURHAM EMPLOYMENT AND WAGES

UNEMPLOYMENT RATES: ANNUAL AVERAGES 2005-2009 (11/09)

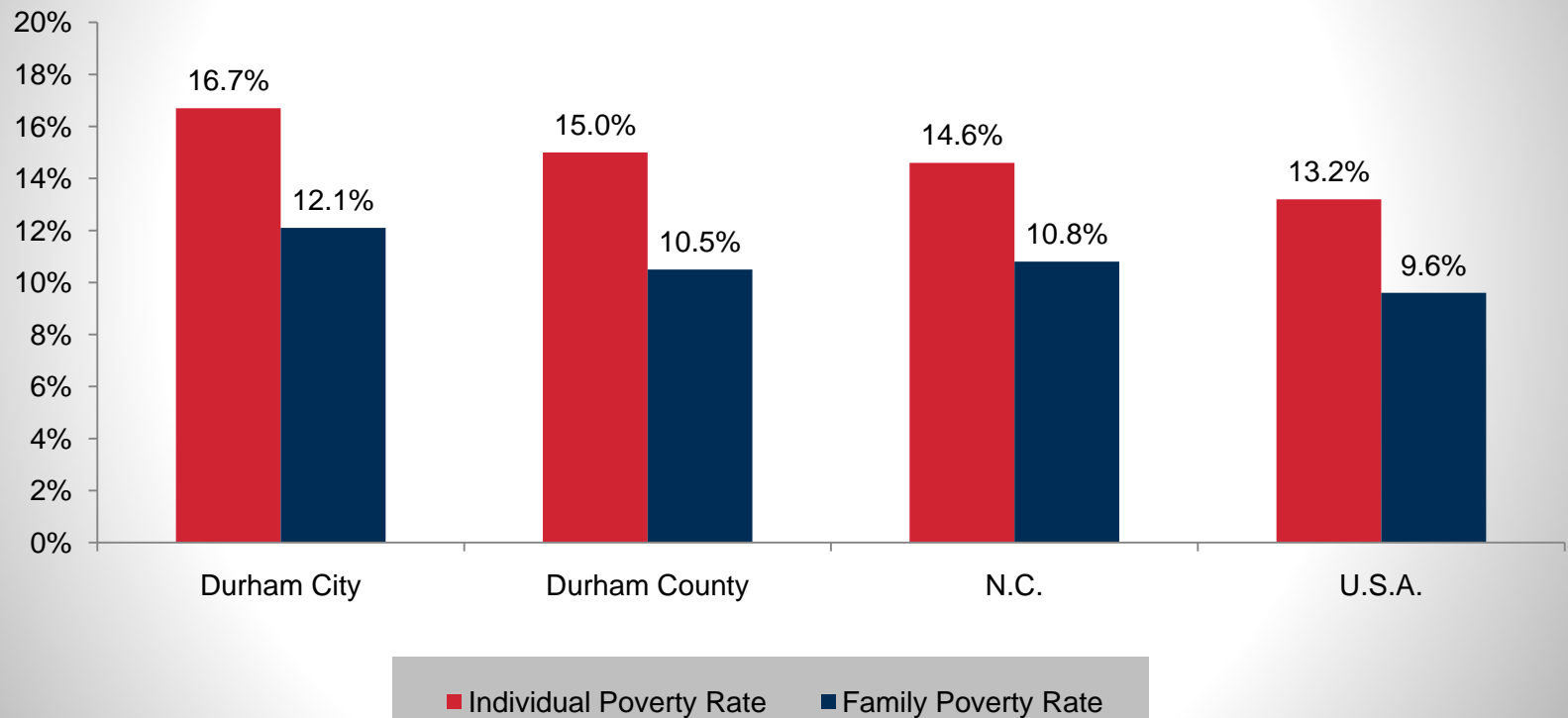
SOURCE: NC EMPLOYMENT SECURITY COMMISSION/OEWD



DURHAM POVERTY RATES

POVERTY RATE BASED ON 2006-2008 ESTIMATE

SOURCE: AMERICAN COMMUNITY SURVEY/OEWD



DURHAM BUSINESS DEVELOPMENT

DURHAM COUNTY ANNOUNCED JOBS & INVESTMENTS: 2009

SOURCE: GREATER DURHAM CHAMBER OF COMMERCE

COMPANY	INVESTMENT	JOBS
Duke University Medical Center	700,000,000	500
Duke Hospital	300,000,000	500
EMC Corporation	280,000,000	290
Lowes Home Improvement	11,700,000	175
NC Biotech Center	10,400,000	
James Scott Farrin	8,870,000	30
Duke University	7,500,000	
Freudenberg IT	5,170,000	70
Shipman Technologies	2,000,000	50
Vivisource	2,000,000	20
Cotton Room	1,650,000	
Cree	1,000,000	575
Mindworks	939,600	4
Biocryst Pharmaceuticals	389,100	60
Gilero Biomedical	375,000	48
McKinney	280,000	70
Burt's Bees	250,000	50
Sipcam Agro USA	235,000	15
Federal Network Connections	100,000	15
TOTAL	\$1,332,858,700	2,472

WHERE WE CAN GO...

2 examples of announced capital investments and jobs:

ACW Technology

- \$4.9 M in announced capital investment
- 155 jobs

Duke University Hospital and Medical Center

- \$1 B in announced capital investments
- 1,000 announced jobs

WHERE WE CAN GO...

For every \$100 spent in manufacturing, \$213.76 worth of spending is created in other sectors

- Professional and business services
- Financial services
- Construction
- Retail

Source: Regional Research Institute at WVU

WHERE WE CAN GO...

- 100 jobs in manufacturing yields 291 jobs in other sectors (100 jobs in electronics manufacturing yields 904 in others)
- 100 jobs in healthcare yields 117 jobs in other sectors
 - Professional and business services
 - Financial services
 - Construction

Source: Economic Policy Institute & Bureau of Labor Statistics

WHERE WE CAN GO...

2 examples of announced capital investments and jobs:

ACW Technology

- \$4.9 M = \$10.4 M in business activity in other sectors
- 155 announced jobs = 1,395 jobs in other sectors

Duke University Hospital and Medical Center

- 1,000 announced jobs = 1,170 jobs in other sectors

WHERE WE CAN GO...

- January 2010 – 12,013 unemployed people in Durham County – 8.6% unemployment rate
- 1,337 = 1 percentage point of unemployment
- 2,472 = announced job openings
- Employ that number at Durham County's average wage:
 - \$79,744,028 in more wages for the local economy

Source: NC Employment Security Commission/OEWD

WHERE WE CAN GO...

- 2 examples of connecting job seekers to high growth industries:
- **Brownfields Job Training**
 - Environmental Technology/Emerging Green Industry
- **StraightLine**
 - Healthcare and Biotechnology

WHERE WE CAN GO...

WHAT COULD ALL OF THIS MEAN FOR
YOUR COMPANY AND/OR YOU AS A JOB SEEKER
IN DURHAM?

WHAT COULD ALL OF THIS SIGNIFY FOR
DURHAM'S ECONOMY?

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